



## IRISH LIFE PRSA

### TRANSFER IN REQUIREMENTS

In all circumstances, we will need a fully completed PRSA Transfer In Application form to facilitate an incoming transfer to a PRSA arrangement. You'll find one of these forms in your PORTUS Literature Library, but we've also included some additional requirements and points to note, depending on where your transfer is coming from.

#### TRANSFER FROM A PERSONAL PENSION OR ANOTHER PRSA

##### **A Fully Completed PRSA Transfer In Application Form to include:**

- Details of the transferring pension arrangement
- Ensure Contributor Declaration has been signed and dated by the client
- Confirmation of who Irish Life should send a willing and able request to (if required)

#### TRANSFER FROM A COMPANY PENSION

##### **A Fully Completed PRSA Transfer In Application Form to include:**

- Details of the transferring pension scheme
- Confirmation of the Revenue Approval number of the transferring scheme
- Ensure Trustee Declaration has been signed and dated by the trustees of the transferring scheme
- Ensure the Contributor Declaration has been signed and dated by the client
- Confirmation of who Irish Life should send a willing and able request to (if required)

#### TRANSFER FROM A PRSA AVC

##### **A Fully Completed PRSA Transfer In Application Form to include:**

- Details of the transferring pension scheme
- Confirmation of the Revenue Approval number of the transferring scheme
- Ensure Trustee Declaration has been signed and dated by the trustees of the transferring scheme
- Ensure the Contributor Declaration has been signed and dated by the client
- Confirmation of who Irish Life should send a willing and able request to (if required)
- Completed "Additional Information if PRSA is being used for AVC's" form (if required)

**PLEASE NOTE: THIS DOCUMENT MAY NOT REPRESENT ALL REQUIREMENTS NEEDED FOR AN INDIVIDUAL TRANSFER AS EACH CASE IS REVIEWED ON AN INDIVIDUAL BASIS. IF FURTHER REQUIREMENTS ARE NEEDED WE WILL CONTACT YOU AS SOON AS POSSIBLE.**